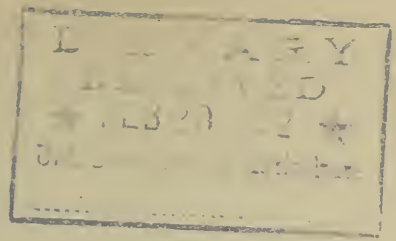


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REPORT F.S. 9



DANISH BACON DISPLACES AMERICAN PRODUCT ON
BRITISH MARKETS

Based on a Report submitted by E. C. Squire,
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Edited in Research and Foreign Statistics Section,
Division of Agricultural Statistics & Prices.

January 21, 1922.

DANISH BACON DISPLACES AMERICAN PRODUCT ON BRITISH MARKET.

Government Supervision in Denmark - English Markets Have Special Preference - Opportunities for American Trade.

The following report submitted by a representative of the United States Department of Agriculture in London shows the extent to which Danish bacon competes with bacon from the United States in English markets. The report brings out especially the effect of Danish competition with the American product since Denmark is by far the chief competitor of the United States. A reference to the Reports of The British Board of Trade and to statistics published in the Trade and Navigation of the United Kingdom will show that other sources of imports than the United States, Denmark and Canada are not of any importance. Table II accompanying this article gives the British imports of bacon, hams and salted pork from the United States, Canada and Denmark during a 14-year period (1901-14).

The statistics of British imports used in this summary are obtained from Statements published by the English Board of Trade and are not meant to be a comprehensive report of all bacon and pork products imported into Great Britain from various countries. It was felt that such a complete statement would merely obscure the points which this article will attempt to portray. Hams are not listed separately for Danish bacon in the British Trade Statistics. While some business is done in this product, by far the largest percentage of Danish ham imports are included in the Danish bacon statistics. The Wiltshire side for example, includes the ham, and practically all Danish bacon exported to England is shipped in that form. This report on Bacon in England is especially to bring out the effect of Danish competition with the American product.

COMPARATIVE PRICES

The prices listed in Table I, covering Danish, Irish, American and Canadian Bacon, were secured from weekly trade reports covering these commodities for both the Liverpool and the London markets. Special consideration is given to quotations in the ports where most of the business was transacted. The averages were prepared from reports covering a week in January, one week in April and one week in September, averaging them for the year. The weekly figures are also given since they show the usual rise in price during the spring and September over January prices.

These prices are really top market prices, rather than an average. This does not mean, however, specially high prices for unusual goods, since it was not felt that the average of the whole range would show as clearly the real situation. The reason for this is that the full range or difference between the highest and the lowest price covered 10/-s or 12/-s and possibly included many lots that were of inferior grade. This is especially true of the Irish Bacon, in which instance an accurate

statement, if obtainable, would show that actual prices received for all Irish Bacon represents but a very slight advantage over the prices received for Danish.

TABLE I

TOP MARKET PRICES FOR DANISH, IRISH, AMERICAN AND CANADIAN BACON
ACCORDING TO ENGLISH MARKET REPORTS

(Prices in Shillings per 112 lbs.)

	<u>U.S.A.</u> <u>Wilt-</u> <u>shire</u>	<u>U.S.A.</u> <u>Cumber-</u> <u>land</u>	<u>U.S.A.</u> <u>A.C.</u> <u>Hams</u>	<u>Danish</u> <u>Wilt-</u> <u>shire</u>	<u>Irish</u> <u>Wilt-</u> <u>shire</u>	<u>Canadian</u> <u>Wiltshire</u>
<u>1901</u>						
Jan. 5	48	46	49	55	66	58
May 4	49	48	50	59	65	56
Sept. 7	54	52	55	69	69	66
<u>1902</u>						
Jan. 4		47	52	62	63	55
May 3		56	57	66	69	60
Sept. 8		62	62	69	70	66
<u>1903</u>						
Jan. 31		50/6	58	57	60	52
May 30		53	60	57	65	55
Sept. 26		56	57	63	65	58
<u>1904</u>						
Jan. 30		39	50	52	53	45
May 28		40	49	60	64	50
Oct. 1		56	54	59	60	57
<u>1905</u>						
Jan. 23		38	46	59	62	50
May 27		53	52	64	67	57
Sept. 30	51	55	47	65	67	60
<u>1906</u>						
Jan. 27	49	48	49	65	68	59
May 26	55	55	57	65	67	60
Sept. 29	61	56	62	70	68	64
<u>1907</u>						
Jan. 26	53	52	61	60	63	56
May 25	58	56	64	67	68	60
Sept. 28		58	55	63	65	60

	U.S.A. Wilt- shire	U.S.A. Cumber- land	U.S.A. A.C. Hams	Danish Wilt- shire	Irish Wilt- shire	Canadian Wiltshire
<u>1908</u>						
Jan. 25	45	47	48	56	58	50
May 30	46	47	52	54	53	52
Sept. 26		62	63	70	70	66
<u>1909</u>						
Jan. 30		52	53	60	63	55
May 29		61	60	70	73	69
Sept. 25		72	64	76	77	73

	U.S.A. Cumber- land	U.S.A. A.C. Hams	Danish Wilt- shire	Dutch Wilt- shire	Irish Wilt- shire	Swed- ish Wilt- shire	Can- adian Wilt- shire	Can- adian Cumber- land
<u>1910</u>								
Jan. 29	66	69	71	68	74		63	
May 28	73	80	78	76	80		74	78
Oct. 1	80	75	78	74	81		78	85
<u>1911</u>								
Jan. 28	63	67	67	62	72		63	64
June 3	54	66	67		73	64	60	58
Sept. 16	61	70	69	64	73	66	65	66
<u>1912</u>								
Jan. 27	48	59	58		63		54	54
June 1	60	64	73		76	70	69	68
Sept. 21	72	66	77		77	74	74	73
<u>1913</u>								
Jan. 25	67	72	78		79	77	72	72
May 31	74	78	80	76	85	77	76	75
Sept. 20	76	74	84	81	84	82	78	79

	U.S.A. Wilt- shire	U.S.A. Cum- ber- land	U.S.A. A.C. Hams	Danish Wilt- shire	Irish Wilt- shire	Swed- ish Wilt- shire	Dutch Wilt- shire	Canadian Wilt- shire
<u>1921</u>								
July 2	115	125	170	190	204	192	190	160
July 16	125	129	200	215	214	204	193	185
Aug. 6	135	135	215	210	204	202	168	175
Aug. 20	133	134	203	203	204	188	175	170
Sept. 3	125	125	175	185	204	175	158	154
Sept. 17	115	115	145	175	194	163	145	135
Oct. 1	108	108	135	130	184	170	150	135
Oct. 22	95	100	118	164	162	150	135	130

DESCRIPTION OF CUTS MENTIONED IN THIS
REPORT

Bacon from Ireland, Denmark, Sweden, Holland, and to a large extent from Canada, is a very definite commodity, the Wiltshire side, practically all of their bacon coming to the English markets in that form. The Canadians make theirs into cuts similar to those employed by Americans to some extent, but their main cut in the past was the Wiltshire side. Before the war the Americans cut practically no Wiltshires. An American Wiltshire was practically unknown in the Liverpool market, which was the main market for American pork products. Some American Wiltshires were sold on the London market, but the trade was of such slight consequence that it was only listed by the official Produce Exchange intermittently. A comparison based on this cut, therefore, is not practicable. Whenever listed, however, before the war or at the present time, the American Wiltshire has varied only slightly in price from our Cumberland cut; consequently, the comparison based on our Cumberland cut against the Wiltshire of other countries is quite a fair one.

The American Cumberland cut has always been our most representative form, and prices quoted for American Bacon are for this cut. The comparative prices of American Hams are also listed because, since the Wiltshire cut contains a ham and is the basis for all other countries, it will be an important consideration here, as the Cumberland contains no ham.

American packers, besides shipping this Cumberland cut, have always shipped a great variety of other cuts. A few of the most important of these are as follows:

Long Clears,
Short Clear Backs,
Clear Bellies.

The shoulders are cut into:-

Square Shoulders
New York Shoulders
Picnic Hams.

The Hams largely are cut into two styles, i.e.:-

American Cut or Short Cut Ham, &
Long Cut Ham.

THE WILTSHIRE SIDE

This cut consists of the whole side of the hog with the back bone removed, aitchbone and blade bone taken out; the front foot cut off at the knee joint and the hind foot cut off at the hock joint. It was handled only slightly before the war by Americans, but was dealt in to a large ex-

tent during the war and is extensively employed at the present time. Cured in dry salt by the Americans; Canadians cure some by the sweet pickle method and others by the dry salt method. Danish, Irish, Swedish and Dutch cure by a very mild pickle cure. Weight - from 40 to 90 pounds.

THE CUMBERLAND CUT

This cut consists of the side of the hog with the ham removed, the shoulder and flank end squared up, back bone and neck bone removed, and the foot cut off at the knee; and the breast bone cut down even. This has always been one of the most stable of American cuts. Cured by dry salt. Usual weight - 22 to 42 pounds.

ENGLISH CLEAR BELLY

This cut is practically identical to what is commonly called Bacon in America. It is made practically entirely from young or "barrow" hogs. It does not include any of the shoulder, ham, or back. It is trimmed up square, cured in dry salt for the English trade, but for the American trade, cured by sweet pickle or an extremely mild dry salt; a very important form of American bacon on the English market; largely traded in at all times. Usual weight, 12 to 20 pounds.

SHORT CLEAR BACK

This cut is the same as the American Pork Loin, with the exception that the back bone and ribs are removed, making it clear of bones, and all of the natural fat is left on the outside instead of being trimmed off as for the American Pork Loin. (The fat portion if removed would constitute a Fat Back). Cured dry salt. Usual weight - from 12 to 22 pounds for the English market.

SQUARE SHOULDERS

Front leg cut off at the knee joint, chopped off three ribs wide and trimmed up at the jowl and butt sides. Usual weight - 10 to 18 pounds. Dry salt cured.

PICNIC HAM

This is a shoulder with the Boston butt sawed off and trimmed up to resemble a small ham. Cured for the English market sweet pickle or dry salt. Usual weight from 3 to 14 pounds.

NEW YORK SHOULDER

This cut is practically the same as the Square Shoulder, except that it is chopped narrower and the shank is cut shorter. Cured for English market sweet pickle or dry salt. Usual weight, from 8 to 16 pounds.

AMERICAN CUT HAM OR SHORT CUT HAM

This cut is the same one as employed for the American trade. Usual weight - from 8 to 20 pounds. Cured dry salt or sweet pickle. Present shipments are largely of the latter cure.

LONG CUT HAM

This cut is practically the same as the American Cut Ham, except that it is cut longer in the shank and on the top. Usual weight from 10 to 22 pounds. Dry salt and sweet pickle cure. Present tendency is largely of the latter cure.

PACKING OF BACON, HAMS AND SHOULDERS

Generally speaking, all bacon, hams and shoulders from America are packed in large boxes to contain about 500 pounds net weight of meat. There are a few people who pack some cuts about 200 pounds to the box, and there are also many others who pack approximately 600 to the box. Continental Bacon is commonly packed in bales containing four Wiltshire sides. Bacon from all sources come to the English market in boxes and bales, with only the first part of the cure complete, i.e., the cure by salt or pickle. The "smoking" is done after it arrives, by English "curers" or "dryers."

THE DANISH BACON INDUSTRY

The Danes had industrialized their live-stock industry long before the war. Large quantities of American and La Platte corn were purchased, and this with their home-grown feeds of barley, roots and skimmed milk, enabled them gradually to make great gains on the English market. Although there is hardly any probability that Danes can supersede Americans entirely, because of the small size of their country, the gradual loss in sales from 1901 to 1913 is disquieting. Even though the spread in price did not show a great increase during this period the demand constantly moved against us. It is due to the fact that the spread in prices was so small and that there would therefore be no special advantage in purchasing from across the Atlantic, that British dealers gradually turned from American to Danish bacon.

METHODS EMPLOYED BY DANES TO GAIN LEAD

BREEDING - FEEDING - CURING - MARKETING METHODS

(1) Breeding: Having one market to produce bacon for, where the Americans have many, the Danes have been able to specialize in breeding a hog best fitted for this market. They have paid a great deal of attention to breeding and have produced a pig of a slightly better proportion than have the Swedes or the Dutch.

(2) Feeding: While large quantities of maize is fed, they also employ barley, skimmed milk and roots, thus producing a leaner pig than a

selected American pig of equal weight and with fat more firm than is possible by feeding solely on maize, with little protein feeds added.

(3) Curing: They cure their bacon very mildly in a pickle cure for a period of less than a week; while Americans cured for the English market largely by strong dry salt cure covering a period of several weeks. Their form of mild cure is made safe by their short distance from market.

(4) Marketing Methods: The Danish Government maintains an export inspection service in order to pass on the quality of all goods exported. The Government takes special means to insure that no company will take advantage of the good reputation of the Danish product to dump stale or inferior goods on the foreign market. Lately the Danish Government has gone to the extent of placing experts in England, to see that Danish goods will not accumulate and deteriorate there.

CAUSE OF AMERICAN TRADE DECLINE

Comparisons of British bacon imports in Table II show the extent to which the Danish bacon situation was gradually changing. Conditions during and since the war have done much to ruin the reputation of American bacon on British markets. Delays of shipping, strikes at the docks, and other causes incident to post war conditions, as well as the methods employed by the British Ministry of Food, have all served to lower the reputation of the American product. If these conditions were merely of war origin, they would quite rapidly disappear. We were gradually losing this trade before the war, however, because of a gradual evolution in the English bacon business in which Americans had not kept pace, and the present great disparity in prices may prove a stimulus to bring this fact home to Americans.

Before refrigeration was universally employed in the curing and preservation of bacon, it was necessary to cure in strong brine or salt. By this method of cure the fat portions were not rendered so unpalatable as was the lean. At that time practically everyone was forced to eat salt bacon, if they ate bacon at all, in both America and England. We are still familiar with the change in American methods. With the general advance of improved methods, all hams, picnics and bacon have come to be cured by a very mild or sweet pickle cure before being smoked. American packers have made a very thorough study of curing methods and have competed with each other in their attempts to produce mild and palatable cures, until, at the present time, practically the only dry salt or strong cured bacon used in America is in the less advanced sections of the country or places where it is not practicable to have continued refrigeration, such as the negro cotton section of the South, in the lumber camps, on ocean freight boats, etc. There is a market, however, for these heavy, fat, strong-salted pork cuts in export largely to the northern parts of Europe. American bacon shipped to the English market is selected from the very best light-weight bacon hogs available, but is still cured by the strong dry salt method to a large extent.

This is one of the ways in which we have failed to keep pace with the evolution of the English bacon business. The English public have learned to like mild cured bacon. The Irish, Danes, English and Continental countries have learned to employ refrigeration in curing (although less refrigeration is necessary for them), and to produce mild cures. As cures for the English market became milder the lean portions became more palatable and demands increased for leaner and still leaner bacon. What has been done by the Danes, Irish, English, Canadians and others in the way of breeding and feeding to best meet this increasing demand for leaner bacon is well worth a very full report. Suffice to say here, that the Danish Government sent experts to England where they selected a type of large white pig which was crossed with the Danish pig. This led to such an improvement that the Canadians and Irish followed suit, and even the English sought to improve their type. The Americans having the lard type hog in mind did not follow this lead.

That present forces are tending to increase the demand for lean bacon mildly cured is evident from the following facts:

(1) The large cities of England, especially London, demand the leaner and milder cured bacon, and the increases in population have been in the large cities.

(2) The laboring classes having received a higher pay have learned to eat the best bacon, and now, even with lower pay, they are showing the greatest reluctance to go back to eating salty bacon.

(3) The fact that this form of bacon is much more palatable gradually increases its use. Even in the North of England (the stronghold of American bacon), the demand for the mild lean type is increasing.

OPPORTUNITIES FOR AMERICAN BACON

The English market offers a fine opportunity for increased consumption of American bacon, if we can give them what they demand, because our methods of production are much cheaper than those of the Europeans.

The statements and suggestions of the European Manager of a large American packing company will prove interesting in this connection:

"This English consuming public have a palate, and if we are going to get this business, we must give them what they want. We are not afraid of the Danes, if we can get the right goods."

"Bacon from Denmark must be cured according to certain standards. If the goods are not properly trimmed and packed or not up to the very best standards, the fact is brought home to the bacon factory producing the goods. The Danes have men in the ports of England to see that best methods

are complied with. If bacon accumulates, shipments from Denmark are stopped."

"If the American Government would do what the Danish Government has done for export, we would be much better off. If the American Government will put on export gradings they will do for export what they did by sanitary inspection - would put the export business on its feet. Label the outside of the boxes "Government Export Grade" and let inspection be voluntary. Besides this grade, let the American packers ship anything they like, but if it is not up to our best, then give them no label. The Provision Exchanges of Liverpool and London have standards to which our goods must conform, but when the goods are not right, and the packers here take the goods back, it does not settle the matter: our reputation is injured; or if one piece in a box is too old and shows taint, the whole lot is injured."

All bacon shipped to England from America should come by refrigerated space (slightly above the freezing temperature), all the year round, especially is this necessary if mildly cured. The representative of the American firm above referred to is of the opinion that the Government might be of great assistance here, and his ideas are as follows:

In the matter of refrigerating space from America, we have been having a feast or a famine. We have to depend upon foreign owned liners largely. When we have been able to get space, we have had to pay too high a price.

(The present ocean rates are 75¢ per 100 pounds common space, and \$1.50 per 100 pounds chilled space for provisions.)

If the American Government, with their excess of shipping can convert some of the boats to give us a dependable service and refrigerated space at a reasonable price, they will do the packing and live stock business a great service and provide use for some of their boats.

Referring once more to the points by means of which the Danes and others have gained their lead, the first of which was "Breeding and Feeding," it is fully realized that the American pork producer has had an entirely different problem than the European. By our production of the lard type of hog, together with our system of cutting in American packing houses, we have captured and held the larger part of the world's lard market. Instead of producing a hog for one market, we have had to produce for a great many and have bred accordingly. An important thought that must be kept in mind is that the American market is a much larger one than the English. Unfortunately, of all export markets for our bacon, the English is by far the best, and it seems that there should be sections in America where the development of this bacon type of hog would be good economy. To accomplish

marked results enough of them would have to be grown to warrant a special export trade mark brand. The production of this type does not mean the exclusion of corn from the ration, but a balancing with other foods higher in protein, such as digester tankage, barley, ground oats, skimmed milk or other foods.

The markets in the large live stock centers have been paying substantial premiums during most of the year for the best available lightweight bacon types. In general, if anything can be done in the way of feeding and breeding, it will just that much improve our opportunities.

CURING

In reference to curing, however, it appears that the type of hog and the method of feeding is but one part of the problem. As I have mentioned before, the English public have learned to eat bacon and hams as mild or perhaps milder in cure than is demanded in America, and they find our bacon, as we are curing it for them, too salty. This seems to be the chief complaint from consumers, and the suggestion that our bacon is too fat and that the fat is too soft and oily, is referred to less often.

As I have mentioned previously, the Danes, Irish and others have developed an extremely mild form of pickle cure, which leaves the lean portions soft and palatable, instead of hard and salty as is the result of the strong dry salt cure. This is a much simpler matter for them, because mild cures must be handled quickly, must not accumulate, in which case it would grow stale quickly, but must go to the smoke-house in England at once and go into consumption without any great delay. Because of the short distance of the Danes, Irish, Swedes and others from this market, they are able to ship mild cured bacon here without the assistance of refrigerated space.

As a general proposition, I do not think there is the slightest doubt but what bacon can be cured in the Central part of the United States quite mildly, and if shipped by proper methods, reach the English market in good condition. A considerable number of progressive people in America have already been working on this method of making our bacon more attractive.

INSTANCES OF AMERICAN SUCCESS

A representative of the Danish Bacon Company of London which is by far the largest of all Danish representatives in England, and is now handling the goods of more than twenty Danish packing houses for the London market, states that, before the war, he had explained something of the Danish cure to the Superintendent of an American company, who was there on tour, and that they had progressed with a great deal of success. The method of cure outlined was extremely mild. He stated that this American concern produced a brand labeled "White Ribbon Brand," which brand is still on the British market. Even before the war, some of the American packers

were trying to adapt themselves in the matter of cure. At the present time there are a large number of packers making experiments along this line. In a recent trip to Liverpool several of the largest bacon importers were visited and all were of the opinion that the American bacon trade is now in an experimental stage. In one place there was offered some sweet pickle cured bacon from an American company which they called "Queen's Brand." There was also some put out by another American company, which they called their "Pheasant Brand." The English importers were very much pleased with the results. The interesting thing was that these Wiltshire sides were selling freely, according to their statements, while other American Wiltshires were in very slight demand. The Canadians have taken this lead ahead of us and are curing quite generally by the mild sweet pickle cure method.

The American packers as a whole have not fully appreciated the necessity of changing their cure. An old book entitled the "Modern Packing House," written by a former general superintendent of an American company, contains the following statement:

"Comparatively little sweet pickled meat is shipped to England, the English taste preferring it cured in dry salt."

At present this is certainly by no means true. For example, most of the American hams now being shipped to England are the sweet pickle cure, the same as for our home trade. During the last summer months these hams brought very high prices which at times rose above the price of Danish bacon, of the Wiltshire cut, which includes a ham. At the same time, our Wiltshire cut bacon was bringing from 50/-s to 75/-s per cwt below the Danish, while our Cumberland cut bacon, dry salt cure, which includes no ham, was selling at about the same price as our Wiltshires with the ham. Undoubtedly, a part of this premium on American sweet pickle ham was due to a temporary condition of the market. Summer demands are always larger, and there was an actual shortage of hams. But it is interesting to note that there were no complaints regarding their flavor and they have been selling very freely.

The Danes feel that they have developed and have in their possession a valuable secret in this method of cure which they believe is their chief weapon over the Americans. American curing and packing house experts who have seen their curing rooms, however, state that they have absolutely nothing especially mysterious. With the great talent developed in America for curing meats, it is only a question of impressing upon the American packer the fact that there is a demand, and he will easily work out the cure. It is not suggested that we should attempt to cure all our different forms of bacon by this mild cure method. Many of the people who buy American bacon expect to get a commodity that can be held in storage without deteriorating so rapidly. There is certainly ample opportunity of doing more than we have done, especially is this true of the Wiltshire side. As previously mentioned, America sold practically none of this form of bacon before the war, although it was the usual form from Denmark, Ireland

and the Continent, and to quite a large extent from Canada. During the war, because of the scarcity from other sections, this cut was taken up in America, and the American packers have spent a great deal of money and re-arranged their killing floors to produce this cut. It is customary in producing this cut to singe or burn the outside of the carcass of the hog before it is opened, and this has made necessary extra equipment. With the war conditions disappearing, it now appears that we must either cure this style of bacon as the English public expect it to be cured, or else abandon it, because this is a direct attempt on our part to compete with European bacon.

OBSTACLES TO BE OVERCOME

The question naturally arises as to why Americans do not cure by mild methods. Some of the reasons are as follows:

(1) Lack of Contact: Most of the American packing houses are represented here by Englishmen who know the buyers and the customs of the country better perhaps than American representatives, but are not acquainted with American packing house methods and are not so well able to give constructive suggestions in the way of betterment of product. It is also common for the sales managers from American packing houses, rather than packing house superintendents, to visit the English representatives in the trade.

(2) Our great distance from this market makes it difficult to regulate supply to demand, and if goods have to be held for any great length of time, they must either be heavily salted or placed in cold storage. Cold storage is not plentiful and is more expensive. There is no cooperation among the American packers relative to the quantity of the goods that they are about to ship to Europe, which leads to a scarcity and then to an excess. The Department of Commerce publishes from time to time the amount of lard, hams, bacon, etc., that we shipped to the various countries during the previous month. This statement is too late to guide the American packers. If the Bureau of Markets and Crop Estimates, while collecting other information from the packers, could get a statement as to what individual packers were planning to ship for the following week, it would be very useful, especially if we could publish it promptly each week, along with a statement of intended shipments the week previous, and shipments a year previous. In this way we might be able to obviate some of the irregularities in shipping.

These irregularities are antagonistic to our trade. They have a lot to do with the extreme fluctuation in prices. The buying of bacon, hams and lard for shipment from America, especially hams, this summer, has resulted in some heavy losses to British importers, because of price breaks. There was a scarcity of hams during July and August and then shipments were too large in early September and prices went down a month before they usually do.

(3) The English market, in fact, all European markets are regarded as a sort of a safety valve by most of the American packers. If there is too much lard or cured pork cuts, a part or all of the surplus may be sent to Europe and so sold at a lower price in order to save the main market in America from heavy price breaks.

A representative of one of the big packers in Europe mentions that his company had their branch houses all over America for their distribution, and that they regarded Europe as a place to ship excess goods. In this way this goods can become tainted before they are offered in Europe. This applies more largely to the Continent than the English market.

(4) Whenever American packers have to make special cuts for a particular market, they are apt to make them only when it "will show a profit," that is, over the American prices. This particularly applies to England. Consequently, we find that many companies are very irregular in their offerings, which does not facilitate the building up of a regular business, or of holding it. As is to be expected, when English buyers take goods that are offered intermittently they do so only when prices are tempting to them. It has been suggested by an American packing representative in this regard, that if an export government grade was given, it should be made contingent somewhat on regular supplies.

(5) The nature of our cost insurance and freight contracts, it appears to me works against the reputation of our bacon. These contracts require the English buyer to take the loss if the goods do not arrive in good condition, providing the goods are properly packed when they are shipped from the packing house and "due precautions used." This clause is interpreted liberally, because, how is an English buyer to prove that this was not done. This has led to the use of regular space instead of refrigerated space, unless the buyer especially demands refrigerated space, because the difference in rates now amounts to about 3/4¢ per pound, and the American packer would have to pay the differences.

(6) The American packer commonly considers it necessary to have a branch house or quite an elaborate selling organization in the important American cities and even in some of the small ones. This same packer's selling organization in England may consist of one English agent representing him in the whole country. This agent may at the same time represent a half-dozen other packing companies. This tends to concentrate the business in the hands of large operators and wholesalers rather than a direct sale by the American packers to the English retail markets. All these factors result in a tendency of American packers to produce a commodity like sugar, which can be stored and will stand delays of shipping and marketing and can be held for better markets than the one in which it may be produced. This also shows the necessity, if we are to make the most of this market, of having one grade consisting of goods produced and marketed as they are at present, and another grade that represents our best efforts to please the English consumer - a product which is cured mildly, shipped as soon as it is cured, by refrigerated space and not

stored for any length of time either in America or England, but handled like the Danish or Irish bacon and absorbed into consumption promptly. This type of bacon is a much more perishable product and would have to be handled as such; consequently, no more should come forward of this type than the market will absorb. The present time seems to be propitious for such a grade, because:-

(1) The public in general is feeling the pinch of restricted buying power, and if they can buy something almost as good for a little less money, they will welcome it.

(2) A great deal has been said here about the bad American bacon, being the result entirely of bad handling. The English would be more apt to believe this and to forget the past if we can now give them something decidedly better. In fact, newspaper items in England have lately been stating that some brands of American bacon now available can scarcely be told from the Danish. A slight amount of this form of bacon has gone forward, but not near enough to supply the market.

(3) The preference in England for certain American trade mark brands has disappeared to quite a large extent during the war period. They were forced to take any brand, and found out that any of them might be good or bad at times.

COMPLAINTS FROM BRITISH IMPORTERS

A canvass of the trade in England shows that we have not succeeded in erasing all the war conditions. The President of the Liverpool Provisions Exchange, states in brief: The Ministry of Food bacon now in traders' hands are, according to his estimate, from 2,000 to 3,000 tons. This is small, but still an obstacle. He further says that American bacon is saltier than it was before the war, and it has been found necessary, in order to avoid trouble, because shipping is not so dependable. He buys quite a large quantity of bacon for shipment to Ireland, and states that in some cases when space is booked to sail promptly directly from New York to Dublin, the boat may wait several days in New York and then drop down to Newport News or Philadelphia for more freight, and possibly make a stop at Queenstown before arriving at Dublin. Not only is the salty cure necessary because of these delays, but the delays prejudice business, because buyers do not know when they are going to get their goods.

A provision man for the Cooperative Wholesale Society, places a great deal of stress on the unreliability of shipments from America. He states that during the past few months, he had received several ocean Bills of Lading from large steamship companies showing that the goods which had been delivered to the docks and signed for by the steamship company had been marked "out out," probably to make room for some other cargo. He did not mean that these things happen in every case, but too frequently. It was also stated that the clearing of boats in England took much longer because of labor conditions and that inland freight in America was not so good as pre-war. Complaint was also made that American packers are not so

prompt in executing their orders as in pre-war days, and that goods are not always fresh when they leave the packing house.

GENERAL NOTES

The matter of curing has already been taken up with several English agents representing American packers. One of these considered the matter of great importance and is going to Chicago in the near future with the purpose of going into the matter more thoroughly and of arranging for experimental shipments.

The American packers have come to use large quantities of borax for packing hams, Cumberlandts, Wiltshires, picnics, and other cuts, instead of packing salt in the boxes for shipment to England. I found in my canvass of the trade that practically all of the importers are objecting, because it leaves such a strong flavor in the meat that cannot be removed. If someone can find some other method of packing our bacon to keep it in good condition a great service will have been performed for the American bacon trade. It is believed that many American packers are putting a great deal more borax on the meat than is required. Some American packers have tried to get away from this objection by packing hams and picnics in parchment paper, but this has not been successful. Parchment paper seems to soak up and get in bad condition before arrival. Besides, this form of packing is expensive.

Before the war there were several packing houses in America that specialized on the English market. Some of these companies were originally Irish houses and later started packing establishments in America. They were accustomed to the English trade. Their goods were handled very well and had a good reputation in England. These companies sold largely by contracts covering several months or a year in advance, to be paid for at market prices when goods arrived. This commonly meant the top of the quoted market. Some of these contracts were for as little as a box a week. It meant a great deal of clerical work and trouble, but it also meant that these goods were going more directly to the curer and consumer.

TABLE II.

BRITISH BACON, HAM AND SALT PORK IMPORTS 1904-14

FROM:-	1901	1902	1903	1904	
<u>UNITED STATES</u>					
Bacon.....	475,364,848	367,791,760	324,072,784	314,284,096	
Hams.....	193,820,032	147,031,248	105,186,928	116,777,808	
Pork, Salted...	15,420,160	11,806,592	10,175,088	8,621,424	
Totals.....	684,605,040	526,629,600	439,434,800	430,683,328	
<u>CANADA</u>					
Bacon.....	44,654,064	51,798,544	74,507,888	92,946,916	
Hams.....	14,097,104	18,360,160	22,119,664	22,033,984	
Pork, Salted...	1,663,088	1,158,976	1,559,936	1,607,536	
Totals.....	60,414,256	71,317,680	98,187,488	116,588,436	
<u>DENMARK</u>					
Bacon.....	118,821,808	140,630,224	167,563,312	193,075,008	
Pork, Salted...	8,647,632	8,614,144	13,635,910	15,617,616	
Totals.....	127,469,440	149,244,368	181,199,222	208,792,624	
FROM:-	1905	1906	1907	1908	1909
<u>UNITED STATES</u>					
Bacon.....	308,586,096	345,422,448	291,179,504	320,130,944	245,173,936
Hams.....	114,559,760	140,516,992	120,790,656	130,995,312	120,239,728
Pork, Salted...	8,621,424	8,421,280	9,079,728	9,085,328	6,231,568
Totals.....	431,767,280	494,360,720	421,049,888	460,211,584	371,645,232
<u>CANADA</u>					
Bacon.....	133,435,680	98,907,424	97,814,080	77,029,008	49,657,216
Hams.....	32,723,375	5,113,696	5,656,336	5,897,584	6,002,416
Pork, Salted...	1,258,096	1,327,536	3,657,696	393,792	(Not
Totals.....	167,417,152	105,348,656	107,128,112	83,320,384	55,659,632
<u>DENMARK</u>					
Bacon.....	164,328,944	163,929,920	201,576,144	229,545,456	202,692,448
Pork, Salted...	12,931,696	13,869,696	18,278,288	20,626,720	22,130,428
Totals.....	177,260,640	177,799,616	219,854,432	240,172,176	224,822,876
FROM:-	1910	1911	1912	1913	1914
<u>UNITED STATES</u>					
Bacon.....	146,375,152	203,597,520	190,214,864	201,977,552	170,571,296
Hams.....	74,566,800	99,367,936	91,839,664	85,183,504	86,778,160
Pork, Salted...	4,352,992	5,126,128	4,884,544	4,733,792	4,121,040
Totals.....	225,294,944	308,091,584	286,939,072	291,894,848	261,470,496
<u>CANADA</u>					
Bacon.....	46,136,720	68,970,384	43,388,912	43,388,912	38,336,032
Hams.....	4,213,552	6,977,040	8,346,800	8,346,800	6,606,320
Pork, Salted...	listed		separately)	
Totals.....	50,350,272	75,947,424	51,735,712	51,735,712	44,942,352
<u>DENMARK</u>					
Bacon.....	200,974,592	237,673,744	259,695,296	261,513,840	304,058,384
Pork, Salted...	20,147,456	20,896,624	18,534,768	20,894,384	23,737,392
Totals.....	221,122,048	258,570,368	278,230,064	282,408,224	327,795,776